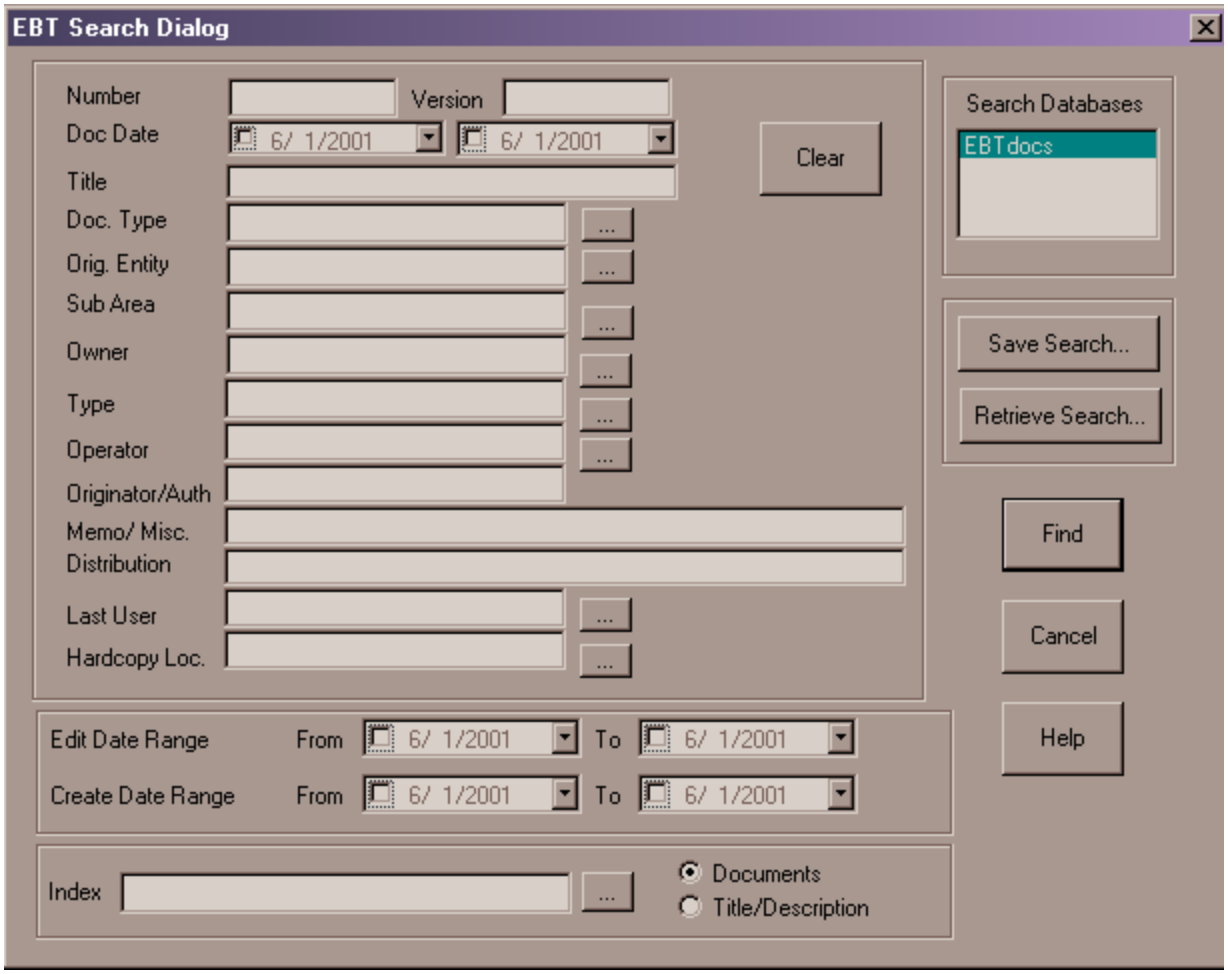
Guide to the

Art and Science of Searching in iManage

Table of Contents

Introduction

There are two distinct types of searches that you can do in iManage: a field search and a full-text search. In a field search you are searching the profile data that users enter fro each document (title, originating entity, hardcopy location, etc.). In a full-text search, you are employing advanced search capabilities to search either against the actual text contained in the documents or the title and description. You can also do a combination search by entering some full-text values and some profile field values. Both types of searches are performed using the same "Search Profile" or "Search Dialog", shown below.

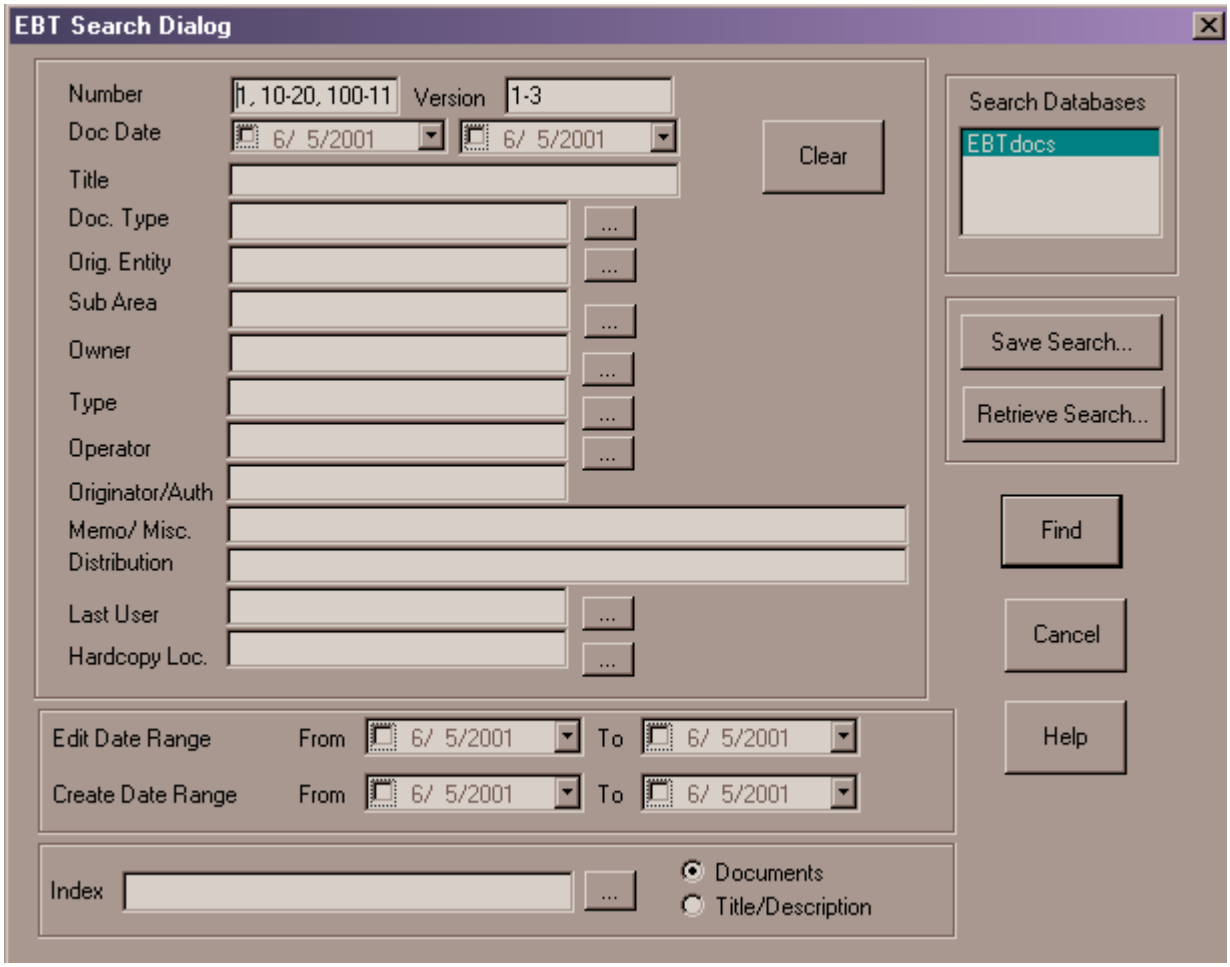


Regardless of which type of search you will be performing, **it is important to click on CLEAR before entering your search criteria** to avoid having inaccurate search results returned.

The Basics

Searching by Document Numbers

The most direct ways to locate documents in the database is to search for specific document numbers. If you know the document number for a document (from a footer), this can be an effective way of locating the document quickly, because every document in the database has a distinct document number and version number. Numbers can be entered in the Number and Version fields in the Search Dialog window either as single numbers or as ranges. You can also use the less than (<) and greater than (>) symbols to find a range of document numbers. The following search would find documents with the numbers 1, 10 to 20, and 100 to 110 (if they exist), and would return only versions 1 to 3 of these documents (if those versions exist).



Searching by Profile and Text Fields

The number one rule of searching: start with a *somewhat* general search. This would be one word in the title and maybe one other profile field.

It is important not to start out too specific or narrow because you may inadvertently exclude documents that you may want due to titling differences.

When search criteria is entered in more than one field, iManage will COMBINE that information and perform an “AND” search. For example, if you enter the word “test” in the title and “MIME” in the Type field, iManage will only return results that meet BOTH CRITERIA (it will not return all documents with the word “test” in the title, it will only return those whose type is MIME (emails) AND that have “test” in the title).

When you specify multiple valid entries in the **same** lookup field (i.e., Originating Entity, Sub Area, Doc. Type, Owner, Operator, Last User, or hardcopy location) iManage will return documents in the search results that match ANY of these entries by performing an “OR” search. This is different from when you specify entries in multiple fields of profile information

For example, if you enter BSMITH and JGARCIA in the Owner field and CORRESPNDENCE in the Doc. Type field, iManage will return all CORRESPONDENCE where EITHER B.Smith OR J.Garcia is the owner.

If you find that your search results include too many documents, you need to restrict the scope of your searches further by narrowing the focus of your search. You can narrow your search and usually decrease the number of hits by adding more criteria to the search profile.

Search Operators

Wildcard Characters

In addition to being able to select validated entries from selection lookup tables, you can also use wildcard characters to expand and simplify searches. Wildcard characters allow you to match only parts of entries in document profile fields. There are two principal wildcard characters: the asterisk and the question mark. The asterisk is also interchangeable with the percent sign. The asterisk stands for any sequence of multiple characters; the question mark stands for any single character. The danger in using wildcard characters is that you will increase your search results by including undesired matches.

The asterisk (or percent sign), truncates the word and finds all variations of it. For example, ASSOC* will find associations, associate, associating, associated, etc.

The question mark is used to match any single unspecified character. For example Anders?n will find Anderson, Andersen, Andersan, etc. This technique is often user to account for possible misspellings or variations within the word.

Using Wildcard Characters in the Title Field

Wildcard characters can be particularly useful in searching the Title field. By default, iManage infoRite automatically inserts wildcard asterisks around your search term (*implementation*). You can change the default in the Advanced Options dialog box in your infoRite settings (tools, options, options). If you do not include the leading asterisk (implementation*), iManage infoRite would only find documents whose Title field **began with** implementation. On the other hand, if you omitted the ending asterisk (*implementation), iManage infoRite would only find documents whose Description field ended with the term implementation.

Full Text Searches

Overview

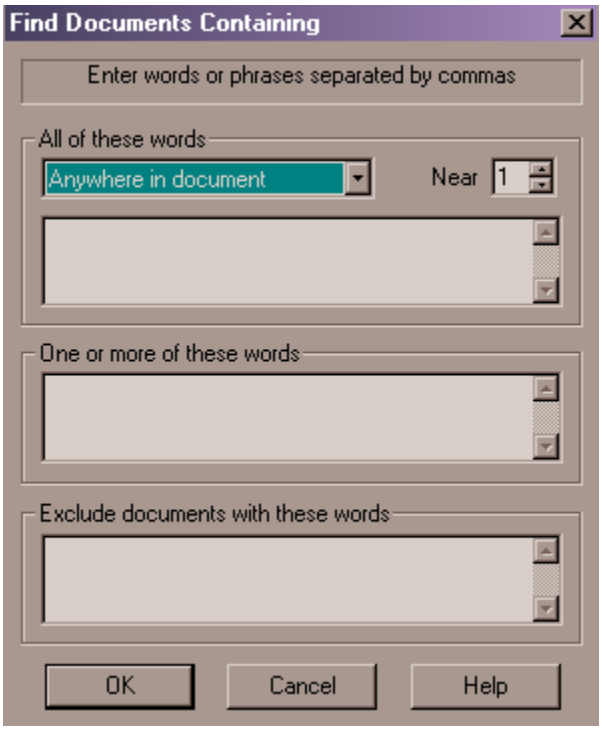
iManage infoRite's full text searches find documents based on the occurrence of individual words, partial words, and phrases, referred to collectively as terms. You can search for occurrences of terms either in the contents of documents or in the text of profile comment fields. You can also perform a search of documents that are within multiple libraries at once. Full text searches can be performed in conjunction with profile searches. The documents that are found must meet the profile search criteria and contain the words or phrases specified by the full text search. By default, full text searches are not case sensitive.

Entering Full Text Search Criteria

You can enter full text search criteria at the bottom of the Search Dialog window. You can also select whether to search through the entire body of the document or the description field of profile information by clicking the Documents or Title/Description radio buttons.

Simplified Full Text Searching

A simplified full text search window is available for users who are not familiar with Boolean logic or who do not want to learn how to construct full text search commands. This dialog box enables you to enter key terms or phrases and to construct a simple full text search query automatically. To access the simplified full text search window: Click on the browse button next to the Index field, which is used to enter full text search queries. When you click this browse button, the Find Documents Containing dialog box appears:



Using the Find Document Containing Dialog Box:

You can use the intuitive Find Documents Containing dialog box to create simple full text search queries automatically. When the Find Documents Containing dialog box appears, enter words or phrases separated by commas into the appropriate fields.

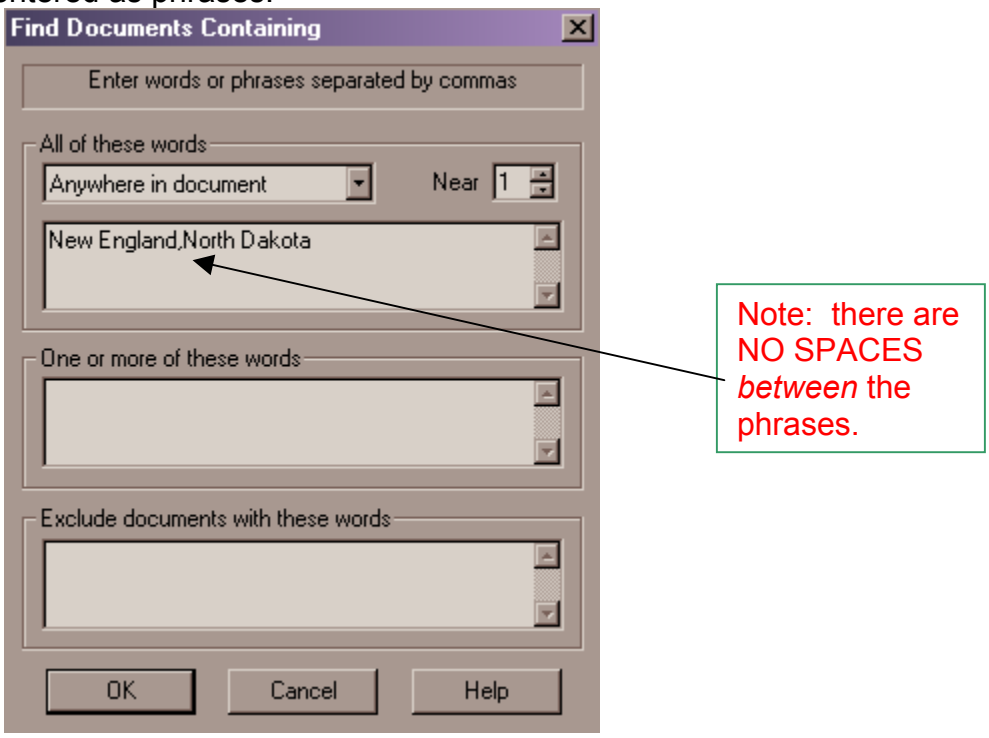
In the topmost field, enter a list of terms that must ALL appear in the document in order for it to appear in your search results. The drop-down list box available above this field lets you set the proximity with which these terms must appear near each other. If you select Anywhere in document, then iManage infoRite will return documents in which these terms appear anywhere in the document, not necessarily within any proximity to each other. If you select Near each other from the drop down list box, then the words listed in the topmost field must appear within a defined proximity of each other in a document for that document to be listed in the search results. The Near field indicates the proximity within which the words in the topmost field must appear in the document in numbers of words. If the Near field is set to 10 and two words are listed in the All of these words field, then these words must both appear in a document and cannot be separated by more than 9 words for iManage infoRite to list the document in the search results.

In the middle field, enter a list of terms only one of which must appear in the document for it to appear in your list of search results ("OR" search).

In the bottom field, enter terms that should exclude a document from the search results if they appear in that document ("NOT" search).

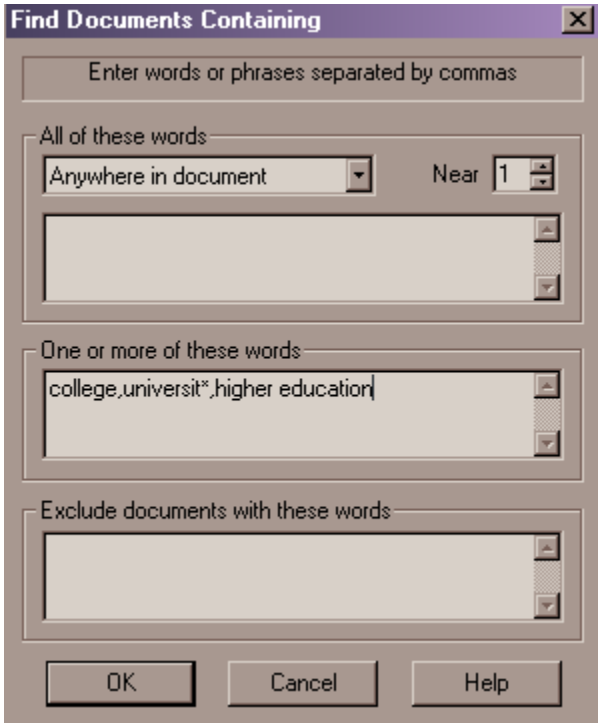
Example with Phrases

The example below would be used to find documents that include both the phrase New England and the phrase North Dakota. It does not return documents that contain the word New and the word England in separate places – these words must be next to each other and in that order because they were entered as phrases.



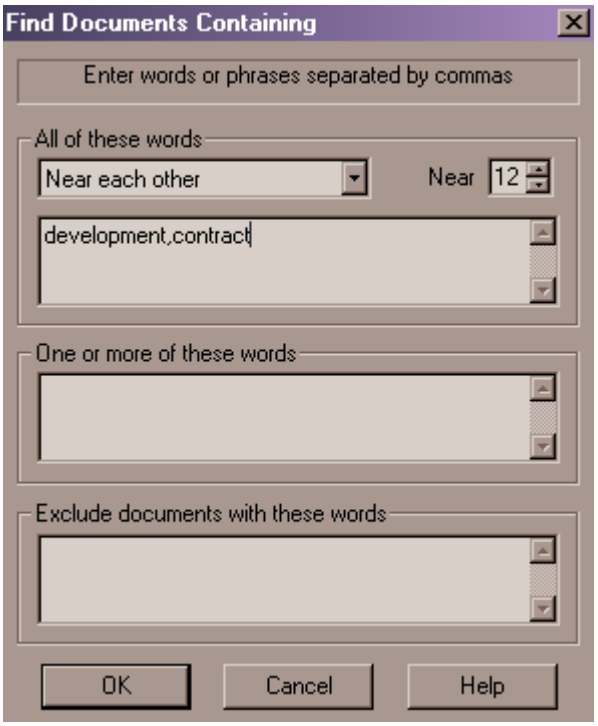
Example with Wildcard Characters

You can also enter wildcard characters in the Find Documents Containing dialog box. The following example shows the use of a wildcard character in the Find Document Containing dialog box with terms entered in the middle field. The example search query would return documents that included the term college, or the phrase higher education, or the terms university and universities.



Proximity Searches

The example below shows how to enter a proximity search in the Find Documents Containing dialog box. By “proximity search,” we mean a search based on the proximity of words in relation to each other in the document, not just on their occurrence in the document. In the example, the Near each other option has been selected from the drop-down list and the Near numeric value has been set to 12. When this search is per-formed, iManage infoRite finds only those documents in the database that contain the words development and contract within 12 words of each other. The two words can appear in any order, but they cannot be separated by more than 11 words.

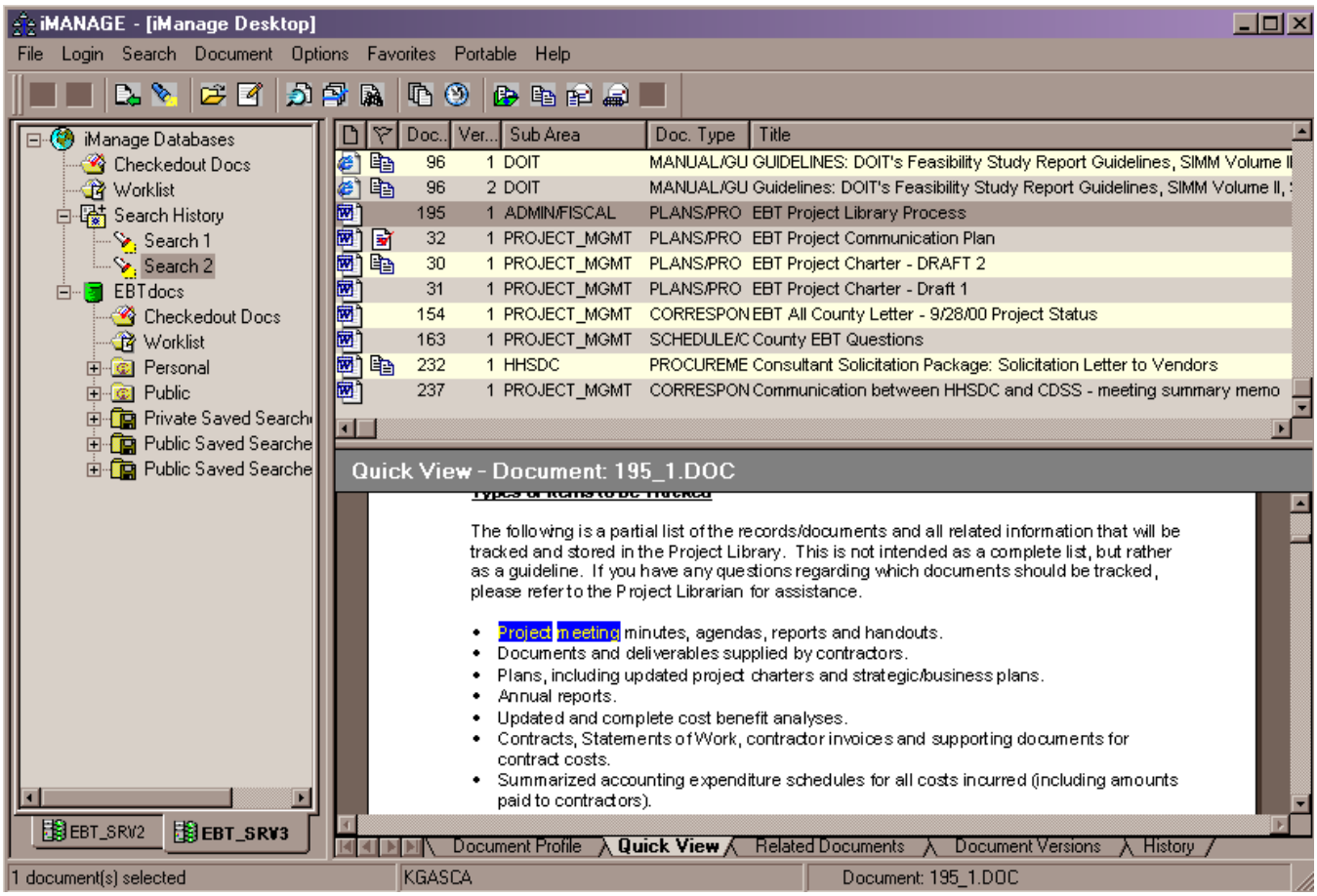


Error Checking

When you click OK in the Find Documents Containing dialog box, iManage infoRite checks the syntax of the terms you have entered and reports any error that you may have entered. If no errors are found, iManage infoRite constructs a valid search query, which appears in the Index field in the Search Dialog window.

Full-Text Results

After completing a full text search, you can see your search criteria highlighted within the document text by using the QuickView tab. Highlight the document in the search results window, and choose QuickView (right click, QuickView or Control-Q):



Search Elements

A query expression is the criteria used to perform a full text search. It is comprised of several elements, either explicit or implicit: operators, modifiers, and terms.

Operators

Operators are codes that represent logic to be applied to a search. These are listed and defined below. To specify an operator in a search, type the operator in less than/greater than brackets and then the word or phrase that you want to find, as in *dog* <*AND*> *cat* or <*STEM*> *facilitate*. Although operators need not be entered in all caps, they appear in this handout as such for the sake of clarity.

Profile Field Operators

Some operators work only in profile fields.

> (Greater Than)

The greater than sign can be used to search for documents that contain a value in a particular profile field that is greater than a specified minimum value. For example, to select documents with a document number greater that 2500, enter the following criteria in the Document Number profile field:

> 2500

>= (Greater Than or Equal To)

The greater than or equal to sign searches for documents that contain a value in a particular profile field that is greater than or equal to a specified value. To search for documents with a document number greater than or equal to 2800, enter the following criteria in the Document Number profile field:

>= 2800

< (Less Than)

The less than sign can be used to search for documents that contain a value in a particular profile field that is less than a specified maximum limit. For example, to search for documents with a version number less than 3, enter the following criteria in the Version Number profile field:

< 3

<= (Less Than or Equal To)

Like the greater than or equal to sign, the less than or equal to sign combines the searching power of the less than and equal to signs. To search for documents with a version number less than or equal to 3, enter the following criteria in the Version Number profile field:

<= 3

Full Text and Description Operators

The following operators work in full text searches of the profile description field and the full-text of documents.

<AND>

This Boolean operator finds documents that contain both terms on either side of it. While the OR operator broadens a search, the AND operator narrows it. Use the AND operator to connect terms with different meanings. The search query New England AND North Dakota would find only documents that contain both phrases; if a document contained only one of the terms, it would not be included in the search results. Enclosing brackets are optional on the AND operator.

<NEAR>

The NEAR operator is similar to AND in that only documents that contain both terms are included in the search results; however, NEAR presents matches that contain both terms close together. For example, suppose you enter the following search:

Lincoln <NEAR> beard

The search criterion finds documents with the words Lincoln and beard near each other.

<NEAR/n>

The <NEAR/n> operator is a more specific variety of the NEAR operator in that you specify the maximum distance allowed between each term. The N variable can be any whole number between 1 and 1,024 (exclude the comma in numbers greater than 999), where 1 indicates that the terms are adjacent. For example, suppose you enter the following criteria:

jefferson <NEAR/7> crop

The search criterion finds documents with the words jefferson and crop within seven words of each other.

<OR>

OR is a Boolean operator that finds documents that contain at least one of the terms to which it is applied. The OR operator enlarges the search topic and is normally used to look for terms that have similar meaning or refer to similar subjects. The search criterion apple OR pear would find documents with one or both of the terms.

<PARAGRAPH>

The <PARAGRAPH> operator searches for documents that include all of the given search elements within a paragraph. You can specify search elements in a sequential or random order.

To get documents that contain variations of the word wombat and the phrase ice cream in the same paragraph, enter:

wombat <PARAGRAPH> ice cream

If you search for more than two words or phrases, you must include the PARAGRAPH operator between each word or phrase. For example, suppose you enter the following criterion:

oak <PARAGRAPH>maple<PARAGRAPH>ash tree

The search finds all documents that have oak, maple and ash tree in the same paragraph.

<PHRASE>

The <PHRASE> operator searches for documents that include a given phrase, i.e. multiple words that occur next to each other in a specific order. By default, two or more words separated by a space are considered to be a phrase in simple syntax, as are words enclosed in double quotes.

ground <PHRASE> zero

is the same as

ground zero

or

“ground zero”

or

<PHRASE> (ground,zero)

All of these will return only documents that include ground next to and before zero.

<SENTENCE>

The <SENTENCE> operator searches for documents that include all of the given search elements within the same sentence. For example, suppose you enter the following criterion:

automobile industry <SENTENCE> aftermarket

The search finds all documents that have automobile industry and aftermarket in the same sentence.

You can specify words in sequential order by using the SENTENCE operator in conjunction with the ORDER modifier.

<STEM>

The <STEM> operator searches for documents that include variations of the word you specify, as well as explicit matches. For example, to search for documents that contain a variation of the word distill, you would enter the following criterion:

<STEM> distill

Matching documents would include the terms distill, distillation, distillery, distilling, distilled, and distills.

Note: The <STEM> operator is used by default and does not need to be specified. To override <STEM>, put the term in double quotation marks.

<THESAURUS>

This operator selects documents that contain one or more synonyms of the word you specify. To locate documents containing synonyms of big, enter the following:

<THESAURUS> big

Matching documents include words such as large, vast and extensive.

<TYPO/N>

The TYPO/N operator performs approximate pattern matching to identify words that are similar to the query term. You can use this operator to search for documents that have been scanned using an Optical Character Reader (OCR). Since the TYPO/N operator must scan the entire index to find potential matching words, this operator is not practical for use in databases containing over 100,000 documents or in performance-sensitive environments.

If you wish, you can specify a variable (N) to define the maximum number of errors between the query term and a matched term. This value is called the error distance. If you do not specify an error distance iManage infoRite uses 2 as a default. This means that there can be a maximum of 2 differences between the query term and the matched term. An error is defined as a character insertion, deletion or replacement. For example, the following table shows word matches with an error distance of 1:

Query and Term	Matching Term	Explanation of Error
<TYPO/1> Mouse	House	H replaces M
<TYPO/1> Agreed	Greed	A is deleted
<TYPO/1> Cat	Coat	O is added

The following table shows a word match with an error distance of 3:

Query and Term	Matching Term	Explanation of Error
<TYPO/3> Sweeping	Swimming	I, M< M replace E, E, P, respectively

The following table shows a word match with an error distance of 2:

Query and Term	Matching Term	Explanation of Error
<TYPO/2> Swept	Kept; wept	S is deleted and K replaces W; S is deleted (1 error does not exceed the maximum error distance of 2)
<TYPO/2> Swept	Kept; wept	Same as above since the error distance 2 is the default

<WORD>

The <WORD> operator searches for documents that include a given word. For example, to search for documents that contain the word carrot, you could enter <WORD> carrot. The WORD operator is only needed when you want to use a modifier, such as CASE, as a search term.

<WILDCARD>

Using wildcard symbols lends a great deal of flexibility to full text searches. Wildcards can be used when searching for word prefixes, roots, suffixes, and/or plurals. Wildcards used by iManage infoRite are listed in the following table. Use the <WILDCARD> operator to indicate when you are using wildcard symbols

Note: Wildcards usually increase the scope of a full text search and can also increase the time it takes to complete them. In particular, using a wildcard symbol at the start of a word can greatly increase search time, because every entry in the index must then be searched.

Symbol	Explanation
?	The question mark replaces any single alphanumeric character. For example, <WILDCARD> b?rn would match born, barn, or burn. Similarly, <WILDCARD> ?andy would match candy, dandy, or sandy. You can use more than one question mark within a term; for example, WILDCARD sh??e could produce shore and shade as matches
*	The asterisk is used to represent any number of alphanumeric characters (including none). For example, WILDCARD *vert* would match convertible, inverted, vertigo, and covert. When using the asterisk wildcard, try to narrow the potential scope of the wildcard entry as much as possible. For

	instance, to find documents about automobiles, the criterion WILDCARD auto* finds the words auto, automobile, and automotive, but it would also find autobiography, autocracy, and autograph. A more specific query is <WILDCARD> auto OR automo*.
[ ]	Brackets tell iManage infoRite to find one of any character within the brackets. For example, <WILDCARD> r[aou]t would match documents that contain rat, rot, or rut. When you enclose a caret (^) within brackets, the search excludes the string of characters to the right of the caret. For example, if you enter WILDCARD '[^block]head', the term blockhead is not included in the search results. Note that you must place the caret before the string of characters you want to exclude, for example WILDCARD '[^block]head', but not WILDCARD '[block^]head'. When you enclose a hyphen (-) within brackets between two letters, iManage infoRite looks for every term within that alphabetical range inclusively. For example, suppose you were to enter WILDCARD 'a[a-w]a', iManage infoRite looks for every matching three-letter term from aaa to awa. **Note**: When you use brackets, you must enclose the word that contains character string with backquotes (‘). The character string cannot contain spaces.
{ }	Braces are similar to brackets but let you search for groups of characters, separated by commas. For example, <WILDCARD> spill{s,age,ing} would match documents that contain spills, spillage, and spilling. **Note**: When you use braces, you must enclose the word that contains character string with backquotes (‘). The character group listing cannot contain spaces.

Literal Searches for Wildcard Characters

If you want a wildcard character to be interpreted as text and not as a wildcard, precede the character with a backslash (\). For example, if you wanted to search for the term M*A*S*H, you would enter <WILDCARD> m*a*s*h.

Simple and Explicit Syntax

You can perform a full text search according to simple or explicit syntax.

Simple Syntax

Simple syntax refers to when you enter just terms with no accompanying codes or punctuation. iManage infoRite produces matches as if the terms are preceded by the STEM operator. Although they are less exact, simple searches net more matches than explicit ones.

Explicit Syntax

You can use explicit syntax by enclosing a word in double quotation marks. When you double-quote a word, iManage infoRite performs a literal search; facilitator and facilitation would not be offered as matches to “facilitate”.

Other Syntax Options

Parentheses

Parentheses indicate the order in which the search is to be executed. iManage infoRite reads information within parentheses before looking at whatever may be outside them. For example, suppose you were to enter the following search:

(Homer AND Marge) OR Bart

iManage infoRite would look for documents that refer to Homer and Marge—not just one or the other. Any documents that referred to Bart also would be included.

Parentheses can also be placed within each other. The following example means, “Find documents that contain either Homer or Marge—it doesn’t matter which— as long as the document also contains Bart. Also, give me any documents that mention Lisa.”

(Bart AND (Homer OR Marge)) OR Lisa

Double Quotation Marks to Search for Operator Words

To search for a word that happens to be an operator, such as AND or NOT, put the word in double quotation marks to indicate that the word should be considered as such, not as an operator. For example, to search for the phrase Lewis and Clark, you would enter:

Lewis “and” Clark